

Message Text

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SUBJ: GLOBAL MARKET RESEARCH: PRINTING AND GRAPHIC ARTS

REF: USDOC 19000

1. FOLLOWING RESPONSES TO QUESTIONS ON DANISH STUDY RECEIVED
10/6 FROM AB KONSULTERNA.

A. 3.11.04B SLOWDOWN OF GROWTH IN MARKET AFTER 1974 DUE TO
(1) INCREASED FOREIGN SOURCING OF PRINTED MATERIALS, AND
(2) THE STRONG DISAPPROVAL BY LABOUR (MUCH STRONGER THAN
IN THE OTHER SCANDINAVIAN COUNTRIES) OF NEW LABOUR- SAVING
GRAPHIC TECHNIQUES HAD A DEPRESSING EFFECT ON INVESTMENT.
THE IMPACT HAS BEEN AS FOLLOWS IN THE VARIOUS SECTORS:
(A) NEWSPAPERS: HEAVY INVESTMENTS IN PHOTOCOMPOSITION EQUIPMENT
AND IN OFFSET PRESSES WERE MADE IN THE PERIOD 1972-1974; NEW
TECHNIQUES BOTH IN PRINTING AND IN PHOTOCOMPOSITION (VIDEO
DISPLAY SYSTEMS) HAVE CONTINUED TO BE DEVELOPED BUT ACCEPTED
BY ONLY A FEW FIRMS BECAUSE OF THE COST, LABOUR DISAGREEMENT AND
BECAUSE OF VARYING OPINIONS ON THE TECHNICAL ADVANTAGES OF
DIFFERENT SYSTEMS.
(B) MAGAZINES: THE NUMBER OF COPIES PRINTED DECREASED FROM
THE SECOND HALF OF 1974, A DEVELOPMENT WHICH CREATED CAUTIOUS
ATTITUDE TO NEW INVESTMENT.

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(C) COMMERCIAL PRINTING: THE COMPETITION FROM ABROAD IN
COMMERCIAL PRINTING GREW STRONGER, THUS SLOWING DOWN NEW
INVESTMENT.

B. 3.30.01E BOOKBINDING: THE MAIN MARKETING TREND IN BOOK-
BINDING IS CONTINUED GROWTH BECAUSE THE MAJOR POTENTIAL FOR
RATIONALIZATION BY THE INDUSTRY (IMPORTANT BECAUSE OF HIGH

SALARY LEVELS) IS CONSIDERED TO BE IN POST-PRINTING PROCEDURES, E.G. IN BOOKBINDING. MOST OF THE NEWSPAPERS EXPRESS INTEREST IN POST-PRINTING EQUIPMENT. THE MAIN TECHNOLOGICAL TRENDS ARE:

(1) INTEREST IN ALL EQUIPMENT THAT WILL REDUCE MANPOWER, HARD WORK AND NOISE, (2) AUTOMATED FUNCTIONS ARE PREFERRED TO MANUAL; LIFTING DEVICES, MAILING MACHINES, AUTOMATIC CUTTERS, STAPLERS AND AUTOMATIC LINES INCLUDING ALL FUNCTIONS FROM FEEDING TO MAILING, (3) AUTOMATED GLUING IS PREFERRED TO STITCHING, (4) THE COMPLETE SELFCONTAINED BOOKPRINTING SYSTEMS ARE BEING STUDIED WITH INTEREST; THE MARKET IS NOT CONSIDERED TO BE BIG ENOUGH FOR MORE THAN 2 OR 3 INSTALLATIONS OF SYSTEMS LIKE THE "CAMERON" OR THE "BOOK-O-MATIC".

C. 3.42.01E LISTING OF TWO US FIRMS AMONG THIRD-COUNTRY SUPPLIERS WAS MADE IN ERROR. PLEASE DELETE.

D. 3.43.01A TOTAL NUMBER OF DANISH FIRMS PRODUCING GRAPHIC INDUSTRIES EQUIPMENT IS 20. TOTAL LABOUR FORCE IS APPROX 1000. THE LABOUR FORCE OF THE SEVEN LARGEST MANUFACTURERS TOTALS ABOUT 750.

E. 3.51.01 GOVERNMENT PRINTING CANNOT BE REGARDED AS EN-USER SECTOR AS THERE IS ONE MAJOR PRIVATE FIRM ACCOUNTING FOR APPROX 70 PER CENT OF THE PRINTING REQUIRED BY THE GOVERNMENT. THE REMAINING GOVERNMENT PRINTING IS DONE PARTLY ABROAD (MUCH UNCLASSIFIED

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TO THE DISLIKE OF DOMESTIC FIRMS) AND PARTLY BY A COUPLE OF SMALL PRIVATE ESTABLISHMENTS. J.H. SCHULTZ BOGTRYKKERI A/S HAD A 1976 TURNOVER OF \$15 MILLION. APPROX 75 PERCENT OF THIS WAS GOVERNMENT PRINTING. THE FIRM CONCENTRATES ON THE PRINTING OF BUSINESS FORMS, PROTOCOLS AND SECURITY PRINTING. MOST PRINTING IS MADE IN OFFSET LITHOGRAPHY.

F. 3.51.01A NEWSPAPER FIGURES FOR 1975 SHOULD BE:

NEWSPAPERS 53
PRINTING UNITS 46
FIRMS 34

TABLE 5 SHOULD CONSEQUENTLY BE CORRECTED TO READ:

NUMBER OF FIRMS

1972	1975	1981
34	34	34

G. "FREE SHEETS" ARE FREELY DISTRIBUTED ADVERTISING PAPERS. AS STATED IN THE REPORT THE FREE SHEET PRESS IN DENMARK IS QUITE

STRONG, WITH ABOUT 340 PAPERS ON THE MARKET AND TOTAL EDITION OF 4.9 MILLION COPIES. ABOUT 50 PERCENT OF THE SHEETS ARE OWNED BY NEWSPAPER FIRMS, AND OF COURSE ALSO PRINTED WITHIN THE NEWS-PAPER ESTABLISHMENTS, ALTHOUGH THE MARKETING IS DONE FROM SEPARATE COMPANIES. OF THE NEWSPAPER-OWNED FREE SHEETS THE TWO DOMINATING COMPANIES ARE "POLITIKENS LOKALAVISER" AND "DE BERLINGSKE OMEGNSKEBLADE" WITH ABOUT 80 PERCENT OF FREE SHEET CIRCULATION. THE REMAINDER OF THE FREE SHEETS ARE OWNED BY SMALLER LOCAL PRIVATE COMPANIES, USUALLY BEING PRINTED IN OFFSET LITHOGRAPHY.

H. 3.51.02B, C SALES FIGURES (MONETARY) FROM 1972 TO 1975 OF NEWSPAPERS AND MAGAZINES ALMOST DOUBLES IN SPITE OF A STAND-STILL IN NUMBER OF TITLES AND OF COPIES PRINTED. THE MAIN REASONS FOR THIS WERE PRICE INCREASES AND AN INCREASE IN UNCLASSIFIED

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ADVERTISING INCOMES. THE PROJECTED DEVELOPMENT OF SALES BETWEEN 1975 AND 1981 IS MADE IN FIXED PRICES AND CORRESPONDS WELL WITH THE PROJECTED GROWTH OF TITLES AND COPIES PRINTED IN THE SAME PERIOD; THUS THE PERCENTAGE DEVELOPMENT OF SALES IN PROJECTED TO 2-3 PER CENT PER YEAR AND THE DEVELOPMENT OF TITLES AND OF COPIES PRINTED IS PROJECTED TO HAVE THE SAME ANNUAL INCREASE.

I. 3.51.02C STATISTICS GIVEN ON THE NUMBER OF WEEKLY NEWSPAPERS IN DENMARK DIFFERS FROM UN STATISTICS DUE TO THE DIFFERENT DEFINITIONS OF WEEKLY; IN OUR REPORT WEEKLY MEANS 1-2 EDITIONS PER WEEK, IN UN STATISTICS 1-3 EDITIONS PER WEEK. THE DISPARITY IN THE STATISTICS OF BOOK TITLES IS HARDER TO EXPLAIN. IT IS BELIEVED THAT UN STATISTICS SHOW NUMBER OF "PUBLISHED" BOOK TITLES WHILE OUR STUDY GIVES NUMBER OF BOOK TITLES "PRINTED".

J. "NUMBER OF COPIES" OF NEWSPAPERS AND MAGAZINES IN TABLE 6 OF REPORT REFERS TO THE NUMBER OF TITLES TIMES SIZE OF EDITION TIMES NUMBER OF EDITIONS PRINTED IN ONE YEAR.
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